Communication Canada

Successful Communication

TOOL *Kit*

Literacy and You

May 2003

Communication Canada

Canada

Literacy
and
You

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Introduction

This groundbreaking and practical tool kit entitled *Successful Communication: Literacy and You*, is designed specifically to assist Government of Canada communicators and managers to better communicate to Canadians information about the policies, programs and services that have been designed for them.

This project was initiated as a result of research conducted by Communication Canada and Statistics Canada showing that a high percentage of Canadians have serious difficulty finding, understanding and using government information. The need to know how best to communicate with the almost half of all Canadians who have low literacy skills led to consulting a team of experts to address this specific challenge. French and English language organizations specializing in literacy and communications issues were consulted, as were individuals in various government departments addressing similar questions. Over several months these individuals contributed resources, expertise and up-to-date research in the literacy field to this unique initiative.

The result of these collaborations is this overview of key techniques, practical examples and case studies that will help to clarify and simplify verbal, written, televised and Internet communications. Many will recognize that the principles of clear and simple communications are essentially the foundations of good communications in general and as such can be regarded as common sense. Looked at more closely, however, the examples illustrate that often what communicators take for granted as being clear and accessible, is not at all.

This tool kit addresses the difference between a message that's sent and one that is received and understood. As public servants, it is in our interest to ensure that government communications reach all Canadians without exception. The principles and techniques offered here apply to government communicators and to anyone wishing to be inclusive in their messages.

Successful Communication: Literacy and You, is a first step in addressing the communication challenges posed by low literacy among Canadians. It is hoped that communicators and managers will incorporate its practical tips and key messages in their efforts to reach all Canadians.

User Guide

This tool kit is divided into eight sections:

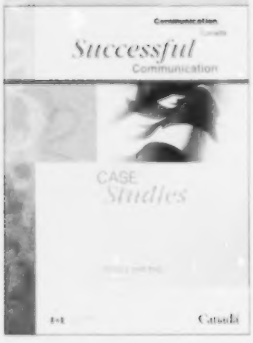
- **Section 1,** *Successful Communication,* recaps the main factors of effective communication and introduces the challenges faced in order to make information accessible, clear and credible.

- **Section 2,** *Successful Written Communication,* provides tips for formulating, organizing and presenting written information.

- **Sections 3, 4 and 5,** *Successful Verbal Communication, Successful Televisual Communication* and *Successful Internet Communication* respectively, highlight tips specific to each means of communication.

- **Sections 6, 7 and 8,** *Evaluation Tools, Contacts* and *Canadian and International Initiatives* respectively, support efforts to ensure successful communication.

All sections have been individually prepared so that they may be used separately. Nevertheless, the key factors for successful communication *(tab 1)* and tips for writing in plain language *(tab 2)* apply to all communication means.



Various case studies from Government of Canada initiatives are also presented under separate cover.

Lastly, this is an evolving document and may be updated as required in order to meet your needs. Consequently, please share any suggestions and comments you may have directly with *Communication Canada's Research Branch* by calling (613) 992-6906 or by e-mailing info@communication.gc.ca.

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Acknowledgements

This tool kit project would not have been possible without the valuable contribution of several government departments and agencies. We would like first to thank Marie Cocking and Elissa Tilley of Indian and Northern Affairs Canada, Martin Dubé and Michel Couture of Canada Customs and Revenue Agency, Michel Gauthier, Doug Taylor and Yves St-Onge of Human Resources Development Canada, Denyse Dufresne of Industry Canada, Heidi Liepold, Lianne Vardy, Yvette Souque and James MacLaren of the National Literacy Secretariat, as well as Jean Pignal of Statistics Canada.

We additionally benefitted from the expertise of several representatives from literacy organizations, namely Charles Ramsey and Rachel Clair of the National Adult Literacy Database, Sally McBeth of Clear Language and Design, Luce Lapierre and Diane Pouliot of the Fédération canadienne pour l'alphabétisation en français and Wendy Desbrisay of the Movement for Canadian Literacy.

We would also like to express our gratitude to Céline Beaudet and her colleagues, Lucie Pépin, Patricia Lord and Jeannine de l'Étoile, of the Université de Sherbrooke. Our thanks also go out to Albert Boulet of the Université du Québec en Outaouais. Grégoire Gollin of Créatec, and Joanne Ward-Jerrett of *The East Coast Reader* were also involved with this project. We particularly want to thank Julian Evetts for his work on evaluation tools.

Lastly, we would like to thank the entire Communication Canada team, particularly the Communications Branch, Community Relations Branch, and Research Branch. It is also important to highlight the contributions of a number of consultants who put a great deal of effort into preparing this document: Nadièle St-Pierre, Amélie Chrétien, Sarah Hubbard and Franceska Gnarowski.

Successful Communication

According to Statistics Canada[1], 48 per cent of Canadians have serious difficulty finding, understanding and using available information so as to function in everyday life. These difficulties are related to their weak reading and writing skills.

Research conducted by Communication Canada[2] has shown that this reality has a major impact on how to effectively communicate with people with low literacy skills. Many of these individuals deem information from the Government to be irrelevant to their situation and difficult to understand. Many simply do not know how to use government information to meet their needs. In addition, although they tend to prefer direct personal contact, they are less likely to initiate communication with the Government and are thus less informed about the programs or services available.

Successful Communication

Communication is considered to be successful when the desired objective is attained. All communication has a purpose, whether it is to inform, to convince or to serve some other purpose.

The concerns expressed by people with low literacy skills remind us of the challenges of successful communication:

- **being relevant**
- **being understood**
- **being persuasive**

Any improvement in communication will benefit all individuals, regardless of their literacy levels.

COMMUNICATION CHALLENGES

Be RELEVANT	Adopt the recipient's point of view and take into account his or her ability to understand
Be UNDERSTOOD	Formulate and organize the information in a clear and simple manner
Be PERSUASIVE	Direct the communication at action and concrete results
=	***SUCCESSFUL COMMUNICATION***

[1]Statistics Canada, Human Resources Development Canada and National Literacy Secretariat, *Reading the Future: A Portrait of Literacy in Canada*, September 1996.

[2]Communication Canada, *Towards Action: Issues and Challenges of Communicating with Canadians with Low Literacy Skills*, April 2005.

1 Successful Communication

Communication Challenges

Relevance relates to the value or interest that the recipient ascribes to the message or to the information. The more relevant the communication, the more likely the recipient will make the effort required to understand it. Communication will be understood when the meaning ascribed to the message faithfully reflects the speaker's intention, that is to say, when the recipient understands the message in the way the communicator intended. In addition, communication will be successful if the recipient accepts the message by taking action, changing behaviour or attitude, accepting an opinion, etc.

Due to limited reading or writing skills, individuals with low literacy skills have to make a greater effort to understand and use information. The communicator must, therefore:

- **demonstrate the importance of the message to increase its value and interest to the recipient;**
- **minimize the effort required on the part of the recipient to understand and accept the message.**

To attain these objectives, the communicator must adopt the recipient's perspective. In the case of people with low literacy skills, the message must be:

- **accessible: within the scope of their knowledge and ability to handle information;**
- **clear: organized and presented in a logical and simple manner;**
- **credible: it must reflect their relationship with or perceptions of the communicator and the subject at hand.**

Section 2 ***Successful Written Communication,*** *provides precise tips for making information accessible, clear and credible. The challenges that low literacy skills pose are considerable, not only because the written word is omnipresent (brochures, forms, Internet sites, newspapers) but also because verbal or visual communications are often based on written logic.*

Lastly, ***sections 3, 4 and 5*** *of this kit provide specific tips for verbal, televised or Internet communications.*

Accessibility, Clarity and Credibility of Information

The following table lists each of these key success factors and recommends various courses of action and tips.

COURSES OF ACTION → *PROMOTING ACCESSIBILITY*
Adapt the message to the recipient's knowledge and experience
Tips:
Choose known words and facts *(dates, events, people)*
Use known representations, images, symbols or codes that lead to the desired result
Make clear analogies based on elements the recipient knows while avoiding oversimplification
Evoke acquired attitudes and values that lead to the desired behaviour
Simplify the message by taking into account the recipient's ability to understand
Tips:
Use known and concrete expressions and associations
Present and explain abstractions, complex principles and unfamiliar information by way of definitions, illustrations, examples
Recognize new information and, if applicable, help the recipient to grasp that information through visual interpretations *(graphs, images, plans)* and repetition
Validate the message by guiding the recipient in the use of the information
Tips:
Facilitate problem resolution: • **set out issues** • **outline the steps to be followed** • **indicate desired result**

Accessibility, Clarity and Credibility of Information

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Adapt the message to the recipient's knowledge and experience

Tips:

Choose known words and facts *(dates, events, people)*

Use known representations, images, symbols or codes that lead to the desired result

Make clear analogies based on elements the recipient knows while avoiding oversimplification

Evoke acquired attitudes and values that lead to the desired behaviour

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Simplify the message by taking into account the recipient's ability to understand

Tips:

Use known and concrete expressions and associations

Present and explain abstractions, complex principles and unfamiliar information by way of definitions, illustrations, examples

Recognize new information and, if applicable, help the recipient to grasp that information through visual interpretations *(graphs, images, plans)* and repetition

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Validate the message by guiding the recipient in the use of the information

Tips:

Facilitate problem resolution:

- **set out issues**
- **outline the steps to be followed**
- **indicate desired result**

COURSES OF ACTION → PROMOTING CLARITY

Provide information in a coherent manner

Tips:

Present the information in an organized, progressive and seamless manner, as applicable:

- **from most to least important**
- **in a natural and logical order**
- **from simple to complex**

Connect ideas, group them together and emphasize their logical relationship

Maintain unity of content and ensure a uniform format

Present essential information

Tips:

Provide only the information that is essential to obtaining the desired result

Avoid elements that depart from the main message and useless explanations

Avoid insinuation and the need to read between the lines

COURSES OF ACTION → PROMOTING EFFECTIVITY

Provide truthful and verifiable information

Tips:

Indicate sources

Provide references or points of contact

Distinguish between hypothesis and fact

Clearly identify the speaker and his or her intentions

Tips:

Have a clear idea of what is expected of the recipient and express it clearly

Take into account the recipient's perceptions of the individual or organization transmitting the message

Avoid ambiguity regarding the identity of the speaker

Preferred Means of Receiving Information

In the winter 2002 Communication Canada Literacy Survey, respondents with low literacy skills indicated a strong preference for written rather than verbal information from the Government of Canada.

As noted in the graphic, written information allows readers to assimilate the information at their own pace and to keep the information for future reference.

Do you prefer to receive or information?

66% *Written*

Both 10%

22% *Verbal*

Do not know 2%

Why?

Of those who prefer written information

More time to read 41%

Easier to understand 27%

Written proof 10%

Of those who prefer verbal information

Easier to understand 40%

Problems reading 9%

Possible to ask questions 8%

Communication Canada. *Towards Action: Issues and Challenges of Communicating with Canadians with Low Literacy Skills.* April 2003.

Successful Written Communication

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Preferred Means of Receiving Information

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PREFERRED MEANS OF RECEIVING INFORMATION FROM THE GOVERNMENT OF CANADA

Do you prefer to receive written or verbal information?

Written 66%

Verbal 22%

Both 10%

Do not know 2%

Why?

Of those who prefer written information

More time to read	41%
Easier to understand	27%
Written proof	10%

Of those who prefer verbal information

Easier to understand	40%
Problems reading	9%
Possible to ask questions	8%

Communication Canada, *Towards Action: Issues and Challenges of Communicating with Canadians with Low Literacy Skills*, April 2003.

2 Successful Written Communication

Canadians with low literacy skills would like to receive information in plain language, organized in such a way that they can easily find what they need.

They want a step-by-step indication of how to obtain government services, although this is seen as less of a priority. They seek information centred on concrete solutions to their problems, with explanations based on examples drawn from their daily life.

PREFERENCES REGARDING COMMUNICATION

INFORMATION *(% having answered "most important")*

Numbers do not add up to 100 due to "Don't know" responses.

Communication Canada, *Towards Action: Issues and Challenges of Communicating with Canadians with Low Literacy Skills*, April 2003.

Successful Written Communication

2

Plain Language

The following table deals with the three elements of successful written communication: formulation, organization and presentation of information. It proposes various courses of action and tips for plain language.

COURSES OF ACTION

Use familiar language, known expressions and illustrations

Tips:

- Choose familiar, everyday words and expressions *(e.g., "quite" rather than "relatively")*
- Define specialized words and difficult concepts, illustrate them with examples and provide a glossary when it is necessary to use several such words/concepts
- Choose concrete rather than abstract words and give explicit information *(e.g., "car crash" rather than "unfortunate accident")*
- Avoid jargon and bureaucratic expressions
- Use acronyms with care and only after having spelled them out
- Choose one term to describe something important and stick to it; using various terms to describe the same thing can confuse the reader
- Add tables, graphs, illustrations and simple visual symbols to promote understanding

Examples:

INSTEAD OF:	USE:
23-01-2003	*January 23, 2003*
We can reasonably speculate that young adults want to hear about terrorism and security issues.	*Young adults are likely to want to hear about terrorism and security.*
Tax payers are encouraged to e-file their tax returns.	*Did you know that you can file your tax returns on the Internet?*

Plain Language

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Choose concrete rather than abstract words and give explicit information *(e.g., "car crash" rather than "unfortunate accident")*	*Tax payers are encouraged to e-file their tax returns.*	*Did you know that you can file your tax returns on the Internet?*
Avoid jargon and bureaucratic expressions		
Use acronyms with care and only after having spelled them out		
Choose one term to describe something important and stick to it; using various terms to describe the same thing can confuse the reader		
Add tables, graphs, illustrations and simple visual symbols to promote understanding		

COURSES OF ACTION

Write simply

Tips:

- Write simple sentences
- Use words in the most understandable order, i.e., subject, verb, complement
- Try not to exceed 25-30 words per sentence
- Choose affirmative statements in the active voice, i.e., where the person doing the action is the subject of the sentence
- Use action verbs rather than verb-noun phrases *(e.g., "ship" rather than "make a shipment")*
- Develop one idea per paragraph (with no more than 4 or 5 sentences per paragraph)
- Use the most efficient processes to develop ideas: description, explanation, definition, comparison, analogy, example
- Choose vertical lists when there are several ideas, preceding them with a statement indicating their nature

Examples:

INSTEAD OF:	USE:
Claims will be processed by the insurer as soon as possible.	*We will process your claims as soon as possible.*
You will also find toll-free numbers and Web site and mailing addresses. These will allow you to access information on programs and services.	*For more information on programs and services, use these:* - *toll-free numbers;* - *Web sites;* - *mailing addresses.*

Use a direct tone and stick to the facts

Tips:

- Write person-to-person: use *"I"* for the speaker, *"we"* for the organization and *"you"* for the reader
- Maintain the same tone throughout the document: transition from personal to impersonal passages creates confusion
- Communicate only essential information, facilitate problem resolution and avoid references to previous points

Examples:

INSTEAD OF:	USE:
The Coastal-Airport Watch Program has two goals: - *to teach people what to look for* - *to help them effectively transmit any information to the appropriate law enforcement agency*	*The Coastal-Airport Watch Program has two goals:* - *to teach you what to look for* - *to help you send your information to the police*

Successful Written Communication

2

COURSES OF ACTION

Adhere to standard grammar rules

Tips:

- Take care with the following difficulties:
  - **subject-verb agreement**
  - **use of correct past participles**
  - **sequence of verb tenses (past, present, future)**
  - **case of pronouns ("I" vs. "me")**
  - **adjectives and adverbs**

Present information in a logical order

Tips:

- Present ideas in an order that is easy to understand according to the point of view of the reader: from general to specific, from most to least important, from what is known to what is new
- Subdivide the parts of the document by grouping information in small units tied together in a logical step-by-step manner using:
  - **expressions or words of relationship**
  - **summary or anticipatory statements**

Examples:

INSTEAD OF:	USE:
The Government of Canada has developed programs such as the clean air action plan to ensure clean air for Canadians and to protect their health.	*To ensure clean air for Canadians and to protect their health, the Government has developed the clean air action plan.*

Facilitate reading and an overall perspective

Tips:

- Indicate the structure of the document by, for example, adding:
  - **a short introduction**
  - **a brief summary of the document at the beginning of the text**
  - **a user guide**
- Maintain unity of theme, subject and main purpose throughout the document

Write simply

Tips:

Write simple sentences

Use words in the most understandable order, i.e., subject, verb, complement

Try not to exceed 25-30 words per sentence

Choose affirmative statements in the active voice, i.e., where the person doing the action is the subject of the sentence

Use action verbs rather than verb-noun phrases *(e.g., "ship" rather than "make a shipment")*

Develop one idea per paragraph (with no more than 4 or 5 sentences per paragraph)

Use the most efficient processes to develop ideas: description, explanation, definition, comparison, analogy, example

Choose vertical lists when there are several ideas, preceding them with a statement indicating their nature

Examples:

Claims will be processed by the insurer as soon as possible.	*We will process your claims as soon as possible.*
You will also find toll-free numbers and Web site and mailing addresses. These will allow you to access information on programs and services.	*For more information on programs and services, use these:* - *toll-free numbers;* - *Web sites;* - *mailing addresses.*

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Write person-to-person: use *"I"* for the speaker, *"we"* for the organization and *"you"* for the reader

Maintain the same tone throughout the document: transition from personal to impersonal passages creates confusion

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Examples:

The Coastal-Airport Watch Program has two goals: - *to teach people what to look for* - *to help them effectively transmit any information to the appropriate law enforcement agency*	*The Coastal-Airport Watch Program has two goals:* - *to teach you what to look for* - *to help you send your information to the police*

Adhere to standard grammar rules

Tips:

Take care with the following difficulties:

- **subject-verb agreement**
- **use of correct past participles**
- **sequence of verb tenses (past, present, future)**
- **case of pronouns ("I" vs. "me")**
- **adjectives and adverbs**

Present information in a logical order

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Present ideas in an order that is easy to understand according to the point of view of the reader: from general to specific, from most to least important, from what is known to what is new

Subdivide the parts of the document by grouping information in small units tied together in a logical step-by-step manner using:

- **expressions or words of relationship**
- **summary or anticipatory statements**

Examples:

The Government of Canada has developed programs such as the clean air action plan to ensure clean air for Canadians and to protect their health.

To ensure clean air for Canadians and to protect their health, the Government has developed the clean air action plan.

Facilitate reading and an overall perspective

Tips:

Indicate the structure of the document by, for example, adding:

- **a short introduction**
- **a brief summary of the document at the beginning of the text**
- **a user guide**

Maintain unity of theme, subject and main purpose throughout the document

COURSES OF ACTION

Make information easy to find

Tips:

- Define sections in such a way that the recipient can quickly and easily find what is of interest
- Compile a table of contents
- Use meaningful titles and headings so as to indicate a subdivision
- Be consistent with typographical emphasis techniques:
  - **bold** and *italicized* font
  - **underlining**
  - **UPPER/lower case contrast**
  - **colour shading, gradation**
  - **borders**
  - **graphics, diagrams, graphs and tables**

Use open space

Tips:

- Avoid presenting crowded information
- Use generous margins and spread out the information
- Avoid creating irregular spaces in the document, for example by using left alignment
- Leave empty spaces to allow the recipient to take notes
- Avoid word breaks *(i.e. from the end of one line to the beginning of the next)*

Use typographical techniques with care

Tips:

- Use serifed fonts for the body of the text and limit sans serif fonts to titles and subtitles
- Use a 12-point type or larger
- Avoid text or sentences all in uppercase
- Use bold format wisely to emphasize important ideas
- Use underlining sparingly: it considerably reduces readability
- Avoid light characters or colours on a dark background

Successful Verbal Communication

Preferred Means of Contact

The spring 2002 survey on government communications showed that fewer people with less formal education had communicated with the Government of Canada (26 per cent compared to 41 per cent of the general population).

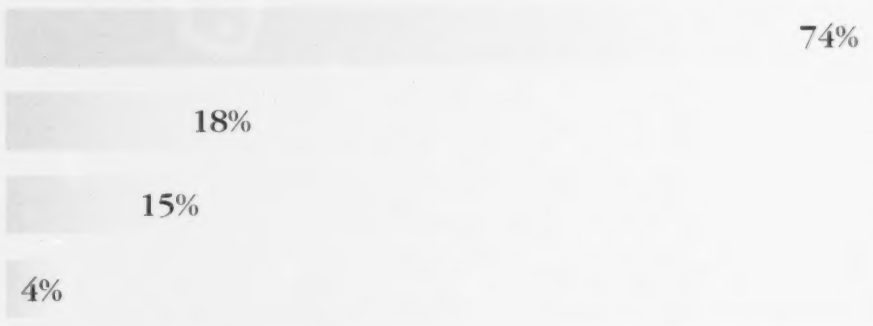
Telephone and personal contact remain the most frequently used means of communication. In such a context, there is no doubt that the quality of personal communication has a decisive effect on public satisfaction.

The varied research has also emphasized the importance of active listening. Communication must be a two-way street.

For individuals with low literacy skills, traditional means of communication are not just a means of obtaining information. This is demonstrated by the fact that, when we clarify certain points and provide additional detail, they understand better and feel reassured.

PREFERRED MEANS OF CONTACT WITH THE GOVERNMENT OF CANADA

26% of those with less formal education contacted the Government of Canada in the three months prior to the survey ...



Respondents were able to choose more than one means.

Communication Canada, *Listening to Canadians: Communications Survey*, Spring 2002.

Relay of Information

Communication Canada's research in the field of literacy has also shown the importance of information relay.[1] It was found that one respondent in ten had asked another person to communicate with the Government on his/her behalf.

These resource people are generally part of a person's network of immediate contacts, i.e., the group of individuals with whom the person has already established and tested a relationship of trust.

[1] Communication Canada, *Issues and Challenges of Communicating with Less Literate Canadians*, revised October 2002; Communication Canada, *Towards Action: Issues and Challenges of Communicating with Canadians with Low Literacy Skills*, April 2003.

3 Successful Verbal Communication

Direct Communication

The following table offers communicators some tips regarding direct communication with individuals with low literacy skills, in terms of both verbal and non-verbal language.

COURSES OF ACTION
Use appropriate verbal language
Tips:
▪ Take the time to listen to and understand the client's concerns, needs and expectations
▪ Ask questions, but avoid overly vague or very long questions
▪ Avoid bureaucratic or professional jargon
▪ Summarize the information provided by the client and establish the relationship between those pieces of information to ensure full comprehension
▪ If the client's needs are not understood, respectfully indicate this and try to obtain additional explanations
▪ Provide all necessary information (step-by-step), adding explanations or concrete examples drawn from everyday events
▪ Regularly verify whether or not the client fully understands
▪ Restate the information if the client does not understand, but avoid repetition, using the same words or speaking louder
Use appropriate non-verbal language
Tips:
▪ Establish and maintain eye contact
▪ Show understanding
▪ Show interest in what the client is saying
▪ Concentrate on the client and avoid needless distractions, such as doodling on a piece of paper or looking at your watch during the conversation
▪ Remain attentive to non-verbal indications that contradict or complement verbal communication
▪ If possible, illustrate your words using tools that promote exchange with the recipient

Successful Televisual Communication

4

Based on studies by Statistics Canada,[1] television is one of the most important sources of information for people with low literacy skills. Indeed, 70 per cent of them say they receive a lot of information from television, compared to 62 per cent of other Canadians.

Communication Canada's *Listening to Canadians* surveys corroborated these results, suggesting that television is a determining influence on the opinion of people with low literacy skills.

COMMUNICATION PREFERENCES

***ADVERTISING** (% having responded "very important")*

Each element was evaluated separately.

Communication Canada, *Towards Action: Issues and Challenges of Communicating with Canadians with Low Literacy Skills*, April 2003.

Television Advertisements

In 2000, three out of four individuals indicated that they would prefer to have the Government of Canada inform them using television advertising.[2]

More recently, people with low literacy skills said that they place considerable importance on the choice of words and language, on the spokesperson and, although to a lesser degree, on the visual presentation of the advertisement.[3]

[1] Statistics Canada, Human Resources Development Canada and National Literacy Secretariat, *Reading the Future: A Portrait of Literacy in Canada*, September 1996.

[2] Communication Canada, *Issues and Challenges in Communicating with Less Literate Canadians*, revised October 2002.

[3] Communication Canada, *Towards Action: Issues and Challenges of Communicating with Canadians with Low Literacy Skills*, April 2003.

4

Successful Televisual Communication

Individuals with low literacy skills strongly prefer advertisements involving testimonials and people relating their own experiences. Research on informational television advertising conducted by Créatec on behalf of the Fédération canadienne pour l'alphabétisation en français[1] suggests that communication effectiveness is seriously compromised by certain advertising techniques, including:

- **implicit and unspoken messages;**
- **subtleties of language;**
- **the imaginary and unlikely;**
- **unclear advertising objectives;**
- **visual illustration indirectly related to the message.**

Results also showed that individuals with low literacy skills:

- **pay selective attention to televised informational advertising;**
- **seek first to determine the relevance of the message;**
- **memorize the various elements to quickly determine the general sense of the message at a literal level.**

To promote effective informational television advertising, the communicator should:

- **raise interest at the very beginning of the message to sustain the effort required for understanding;**
- **minimize the effort required for the recipient to understand, accept, and act on the message, if desired.**

It must be recognized that informational television advertising raises important challenges when communicating complex messages. This means of communication does not permit people with low literacy skills to control the pace at which the information is transmitted, or to retain the information for future reference.

Research regarding informational television advertising and studies conducted by Communication Canada underline the importance of being relevant, understood and persuasive. They reinforce the value of the key factors for successful communication *(see tab 1, Successful Communication)*.

This research also highlights the importance of applying lessons learned for communicating in plain language for successful televisual communication *(see tab 2, Successful Written Communication)*.

[1] Créatec. *Characteristics of TV Ads for the General Public that Inform Less Literate Audiences*, October 2002.

Successful Televisual Communication

4

Informational Television Advertising

The table that follows proposes courses of action for successful informational television advertising, and offers tips adapted to this medium.

COURSES OF ACTION
Reinforce the importance or personal relevance of the message
Tips:
- Illustrate the importance or relevance of the message clearly and quickly from the recipient's point of view
- From the outset, portray the action or context both visually and verbally
- Evoke the recipient's emotions and individual experience so that he/she identifies with the message and does not just understand it intellectually
Make the message complete, explicit and unique
Tips:
- Establish the specificity of the message
- Deal with only one idea at a time
- Use visual or sound elements to attract attention to the critical elements of the message
Focus on the realities of everyday life
Tips:
- Give preference to situations based on everyday life with a high degree of realism
- Avoid the imaginary, the unlikely, the subtle and the figurative, as well as plays on words
- Avoid special effects that have no relationship to the content of the message

COURSES OF ACTION

Explain the message visually

Tips:

- Produce images that, of themselves, help the recipient to explicitly understand the message
- Integrate the verbal message and sound clues into the visual to reinforce it, not the opposite
- Provide useful information on-screen *(e.g., telephone numbers)* and present them in a way that reflects their importance *(font size, exposure time, location on-screen)*

Promote repetition and ensure appropriate broadcast frequency

Tips:

- During the advertisement, repeat important elements of the message
- Set a reasonable period of time between successive broadcasts
- Re-emphasize the importance of the message at the end of the advertisement to maintain interest in future exposure

Ensure synergy and synchronicity between the various elements at all times

Tips:

- Ensure convergence of the various elements of the advertisement *(images, spoken words, words on-screen, music, context)*
- Stick to the essential *(spoken words, sounds, images)*

Select an appropriate advertising style and tone

Tips:

- Opt for an advertising style that permits convergence of the various elements of the message and reinforces the informative value
- Use an explicit and concrete style rather than an original one
- Use testimonials and spokespersons as vehicles

Successful Internet Communication

5

Use of the Internet as a source of information has increased spectacularly over the past five years. In Canada today, the percentage of users is nearly 70 per cent of the population. Furthermore, more than 40 per cent of Canadians chose the Internet to gather information in the spring of 2002[1].

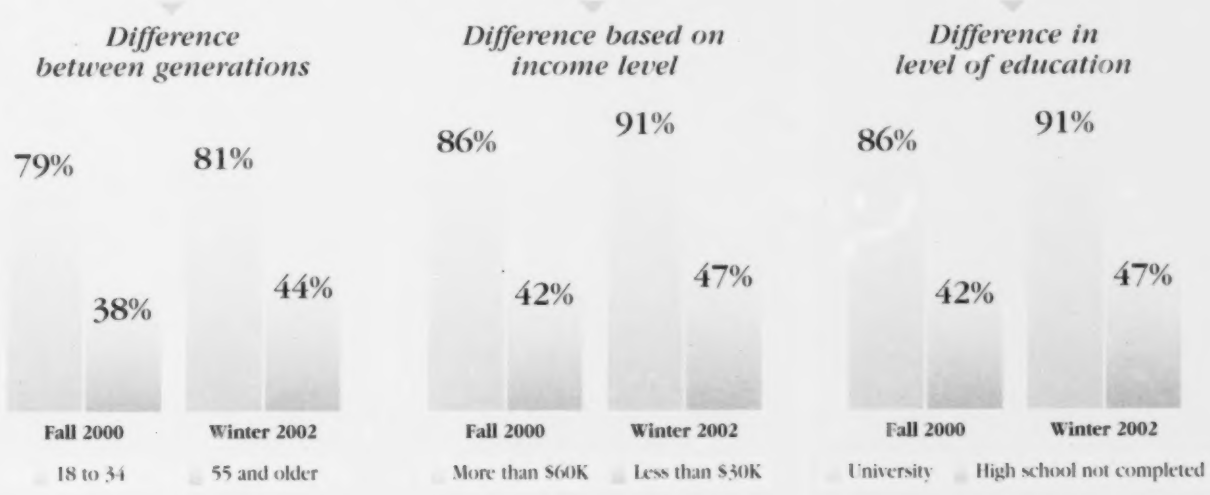
As seen in the graph, the groups that use the Internet the least are associated with individuals with low literacy skills:

- **older Canadians;**
- **lower-income individuals;**
- **those with less formal education.**

However, individuals with low literacy skills are less afraid of using new technologies than they are of not being able to find and understand the information available.[2]

INTERNET ACCESS

% having access to the Internet



Communication Canada, *Listening to Canadians: Communications Survey*, Winter 2001.

When surveyed regarding improvements to on-line services and information, individuals with low literacy skills indicated that they would like them to be more:

- **respectful;**
- **secure;**
- **useful;**
- **credible;**
- **reliable.**

They also clearly prefer information focused on concrete results (for example, finding a job, applying for employment insurance or the Canada Pension Plan).

[1] Communication Canada, *Listening to Canadians: Communications Survey*, Spring 2002.

[2] Communication Canada, *Issues and Challenges of Communicating with Canadians with Low Levels of Literacy*, revised October 2002.

PRIORITY INTERNET ISSUES

Of those with less formal education *(% choosing)*

Each element was evaluated separately.

Communication Canada, *Listening to Canadians: Communications Survey*, Winter 2001.

Internet Sites

Internet sites are sources of general public information with specific characteristics due to the fact that they are not consulted in a linear manner, like a printed document that is read from start to finish. The linear approach must yield to the fragmentation of information, the sheet of paper to a monitor, the static nature to dynamism and interaction.

A document designed for the Internet can thus be distinguished by certain characteristics:

- **suitability for on-screen consultation (which limits the length of pages to be written);**
- **multimedia content (text and images – static or dynamic – as well as sound and video);**
- **ability to be read in an optional and non-linear way (requiring that each part of the site be independent, while maintaining a link with the other parts).**

These distinctive characteristics require the communicator to modify the traditional practices of formulating, organizing and presenting information in order to adapt more specifically to individuals with low literacy skills.

Tab 2 ***Successful Written Communication,*** offers tips for plain language that can be applied to written media and can also be used for Internet sites.

Successful Internet Communication

5

Specific Considerations

The table that follows proposes courses of action for successful Internet communication, and offers tips adapted to this medium.

COURSES OF ACTION
Make navigation as intuitive as possible and make sure the links are clear

Tips:

- Opt for a clear structure: all information should be accessible by a maximum of three mouse clicks
- Ensure consistency in commands and navigation options:
  - **Provide a plan or site map, section or page summaries *(menus and sub-menus for large quantities of content)***
  - **Place the navigation buttons and toolbars strategically and discreetly**
  - **Offer navigation help tools**
  - **Use directional icons to facilitate intra- or inter-page navigation**

Manage the visual space to avoid scattered information and to facilitate reading

Tips:

- Define the divisions, the placement of various text blocks, graphics and visual elements:
  - **Organize the page surface**
  - **Divide the various text zones**
  - **Choose a standard style *(titles, subtitles, quotations, hyperlinks, colours, types of imagery)***

Promote readability

Tips:

- Ensure that the volume and density of the information contained in an electronic document is equivalent to half of that of a written document
- Carefully balance the text and illustrations
- Cut up and sufficiently space the paragraphs and opt for vertical lists
- Avoid dark screen backgrounds and glaring background images
- Use standardized fonts and appropriate character size

COURSES OF ACTION

Carefully choose the typography

Tips:

- Do not overuse bold characters, which can negate the recall value
- Avoid the use of italics and upper case for long passages
- Reserve underlining for text hyperlinks

Ensure a user-friendly interface

Tips:

- Permit re-sizing of windows and, if possible, offer an icon to increase text size
- Pay attention to download times
- Optimize the weight to quality ratio for images and page content
- Avoid unnecessary animation

Choose interactions based on needs and objectives

Tips:

- Correctly identify the source: the name of the organization should always be evident
- Examine the possibility of electronic messaging, forums and Internet chat
- Offer on-line help
- Reserve a section for frequently asked questions *(questions and answers)*

Ensure technical compatibility

Tips:

- Plan for upgrade solutions when technology becomes outdated *(stand-alone version, image replacement text, downloading of software for multimedia)*
- Respect standards for browsers, colour palettes and screen resolution
- Ensure the efficiency of the internal search engine

Evaluation Tools

6

Concerns about available information expressed by people with low literacy skills call to mind the challenges of communicating successfully. Information must be accessible, clear and credible from the recipient's perspective in order to ensure successful communication *(see tab 1, Successful Communication)*.

This section reviews various tools for evaluating the accessibility and clarity of information. It presents several tips linked to public opinion research conducted with people of low literacy skills. The use of these tools and tips may require the involvement of experts *(see tab 7, Contacts)*.

Accessibility and Clarity of Information

Known obstacles that are likely to undermine the accessibility and clarity of information can be grouped together and illustrated as follows:

DIFFICULTIES FACED BY THE RECIPIENT	ELEMENTS TO CONSIDER
"I have trouble reading"	Perception – graphic readability (size, colour, contrast and sharpness of characters, highlighting) and density of text
"The text is difficult"	Knowledge required – readability of the vocabulary and syntax
"I do not see the connection"	Logic of information – intelligibility of how information is organized and presented
"I do not understand what I am being told"	Basis of communication – perception and meaning of information
"I do not understand how this relates to me"	Purpose of communication – personal interest or importance

These difficulties, which arise in the comprehension process, do not present themselves sequentially, but arise simultaneously and interact with one another.

Readability and Intelligibility Formulas

Readability and intelligibility formulas evaluate the reading skill level required to understand a document. Results are generally expressed in terms of grade level.

Readability formulas can provide an initial overview of a text's level of difficulty in terms of wording (vocabulary and syntax). The best-known formulas[1] are:

- **Flesch formulas or Reading Ease Level tests – evaluate the number of syllables per word and number of words per sentence;**
- **Gunning formula or Fog index – evaluates the average length of sentences and the number of multi-syllable words;**
- **Dale-Chall formulas – compare the words in the documents with a list of known words for a given grade level.**

Intelligibility formulas, which are more complex, deal with the organization and presentation of information. They evaluate the complexity of the tasks required to understand text structure, identify the subject and follow the flow of ideas and, in general, measure information density.[2]

However, these formulas do not evaluate the capacity for in-depth comprehension of a text based on the communication situation and, therefore, cannot guarantee the effectiveness of communication. They are subject to the following limits:

- **they do not take into account the readers' true abilities and their motivation;**
- **they are hard to apply when evaluating forms, tables, illustrations or other visual aspects;**
- **they do not show the writer the type of changes to be made, except for complex words and sentences that are too long.**

Public Opinion Research

Public opinion research offers the possibility of evaluating communication initiatives, by practical testing or surveys, from the perspective of people with low literacy skills. Such research also makes it possible to measure the impact and the desired outcome (relevance, comprehension and persuasion).

TOOL 7 ***Contacts,*** provides a list of literacy organizations. These organizations can play an important role in recruiting persons with low literacy skills for public opinion research.

[1] For an overview of various formulas, see:
- Supply and Services Canada. *Trainer's Guide to Plain Language: Clear and Simple*, 1994.

[2] For an illustration of how to evaluate document complexity, see:
- Chebat-Gelinas, C., C. Prefontaine, J. Lecavalier and J.-C. Chebat. *"Lisibilité, intelligibilité de documents d'information. Analyse de textes par ordinateur (ATO)."* June 1993. (http://corpus.ato.uqam.ca/sato/publications/bibliographic/C3lisib.htm)
- Evetts, J., *"Assessing the Complexity of Literacy Tasks: A Guide to Analysis with Examples and Exercises,"* 2002. (www.ibd.ab.ca/Literacy-task.html)

Public Opinion Research

The following table proposes various courses of action for successful public opinion research and offers tips.

COURSES OF ACTION
Foster a friendly environment during focus groups and interviews
Tips:
Opt for an individual interview and do not exceed 90 minutes
Avoid focus groups of more than four persons
If possible, conduct interviews in homes or in the offices of community organizations
Use a plain language interview guide
Tips:
Review survey tools according to plain language principles
Opt for projective techniques and simple tasks *(balloon test)*
Avoid comparative evaluations of documents *(evaluate one at a time)*
Ask concrete questions *(Who? What?)*
Avoid more abstract or open-ended questions *(Why?)*
Select the type of survey carefully
Tips:
Opt for face-to-face methods or telephone surveys
Avoid mail-in or e-mail surveys
Limit interview length to the required minimum

Public Opinion Research

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Select the type of survey carefully **Tips:** Opt for face-to-face methods or telephone surveys Avoid mail-in or e-mail surveys Limit interview length to the required minimum

COURSES OF ACTION

Prepare and use a well-designed questionnaire

Tips:

- Review the questionnaire based on plain language principles
- Limit the survey to essential information
- Ask the easiest questions first
- Opt for closed-ended questions
- Ask concrete questions *(Who? What?)* and avoid more abstract or open-ended questions *(Why?)*
- Define and repeat essential words
- Check regularly to ensure comprehension
- Use simplified scales and avoid multiple-choice questions

Create a reassuring climate

Tips:

- Show empathy:
  - **speak in simple terms**
  - **encourage criticism**
  - **use the respondent's words**
  - **attribute as much importance to what is not understood as to what is understood**
- Use a reassuring tone
- Reiterate the fact that the evaluation deals with the issue or document
- Be reassuring vis-à-vis confidentiality and anonymity

Literacy Organizations

In Canada, there are several non-profit organizations working in the area of literacy. These organizations encourage the accessibility and clarity of communication at all levels and in all parts of the country.

The following is an alphabetical list of some of the organizations providing services in support of successful communication.

Canadian Public Health Association

Description and Mandate

The Canadian Public Health Association's (CPHA) National Literacy and Health Program (NLHP) raises awareness among health practitioners of the links between literacy and health in Canada. It promotes plain language and clear verbal communication in professional practice.

In October 1997, NLHP established the Plain Language Service (PLS) as part of its commitment to literacy and health. In its six years of operation, the PLS has worked with over 150 clients from the private, public and voluntary sectors.

Services provided

- Clear and simple language, style assessment and revision
- Clear Internet design
- Focus testing
- Training workshops in clear communication techniques
- New document development

Publications

- *Directory of Plain Language Health Information* (www.pls.cpha.ca/english/direct/cover.htm)

Contact

Deborah Gordon-El-Bihbety
400-1565 Carling Avenue
Ottawa, ON K1Z 8R1
Tel.: (613) 725-3769
Fax: (613) 725-9826
E-mail: nlhp@cpha.ca
Internet site: www.cpha.ca

- **Language of service:** English and French

Fédération canadienne pour l'alphabétisation en français

Description and Mandate

The Fédération canadienne pour l'alphabétisation en français (FCAF) is a Canada-wide, non-profit organization. FCAF represents Francophone groups and associations promoting French literacy in Canada. Among other things, it has established Communicateurs efficaces. *This firm provides rewriting and training in clear communication.*

Services provided

- A consulting service in writing and editing, and in clear and simple communication
- Customized group training sessions in clear oral communication and simple and effective writing and translation
- Validation of written or other types of communication through discussion groups made up of literacy learners

Contact

Luce Lapierre
Executive Director
205-235 Montréal Road
Ottawa, ON K1L 6C7
Tel.: (613) 749-5333
or 1 888 906-5666 (toll-free)
Fax: (613) 749-2252
E-mail: alpha@fcaf.franco.ca
Internet site: www.franco.ca/alpha

- **Language of service:** French

Prepare and use a well-designed questionnaire

Tips:

Review the questionnaire based on plain language principles

Limit the survey to essential information

Ask the easiest questions first

Opt for closed-ended questions

Ask concrete questions *(Who? What?)* and avoid more abstract or open-ended questions *(Why?)*

Define and repeat essential words

Check regularly to ensure comprehension

Use simplified scales and avoid multiple-choice questions

Create a reassuring climate

Tips:

Show empathy:

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- **encourage criticism**
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Reiterate the fact that the evaluation deals with the issue or document

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Services provided

A consulting service in writing and editing, and in clear and simple communication

Customized group training sessions in clear oral communication and simple and effective writing and translation

Validation of written or other types of communication through discussion groups made up of literacy learners

Contact

Luce Lapierre
Executive Director
205-235 Montréal Road
Ottawa, ON K1L 6C7
Tel.: (613) 749-5333
or 1 888 906-5666 (toll-free)
Fax: (613) 749-2252
E-mail: alpha@fcaf.franco.ca
Internet site: www.franco.ca/alpha

Language of service: French

Frontier College

Description and Mandate

Frontier College is a Canada-wide, non-profit literacy organization. With assistance from volunteers, Frontier College helps individuals across the country to further develop skills in reading and writing. Literacy is a right and Frontier College works to achieve literacy for all.

Services provided

Clear language workshops that are customized to meet the needs of particular organizations

Publications

Clear Lines – How to Compose and Design Clear Language Documents for the Workplace (www.frontiercollege.ca/english/public/press/clearlns.htm)

Contact

Marlene A. Pionteck
35 Jackes Avenue
Toronto, ON M4T 1E2
Tel.: (416) 923-3591, ext. 314
or 1 800 555-6253 (toll-free)
Fax: (416) 323-3522
E-mail: mpionteck@frontiercollege.ca
Internet site: www.frontiercollege.ca

Language of service: English and French

Laubach Literacy of Canada

Description and Mandate

Laubach Literacy Canada (LLC) is a national non-profit organization committed to raising literacy levels by providing tutors. Laubach provides training for people wishing to improve their basic and functional skills in reading, writing, speaking, listening, numeracy and other life skills.

Services provided

Helps interested groups to find expertise in clear and simple language services

Publications

LLC's *New Readers Bookstore* carries a wide range of publications on clear and simple language. The catalogue can be accessed on LLC's Internet site, www.laubach.ca

Contact

Robin Jones
Executive Director
60-C Elizabeth Street
Bedford, QC J0J 1A0
Tel.: (450) 248-2898 / 567-7046
Fax: (450) 248-7054
E-mail: robin.jones@sympatico.ca
or laubach@netc.net
Internet site: www.laubach.ca

Language of service: English

The Movement for Canadian Literacy

Description and Mandate

The Movement for Canadian Literacy (MCL) is a national non-profit organization representing literacy coalitions, organizations and individuals from every province and territory.

MCL's mission is to be a national voice for literacy for every Canadian through networking, research, government liaison, learner development, communication, collaboration and helping to build capacity to support the people and organizations involved with adult literacy education.

Services provided

MCL acts as an advocate for clear communication and refers interested groups to expertise and services related to readability, clear language and document design, including:

- readability assessment;
- writing/editing/document design;
- training;
- field/focus testing of materials with literacy learners.

Publications

What Adult Learners Would Like YOU To Know; a pamphlet that includes advice for communicators, from MCL's Learners Advisory Network. (www.literacy.ca/lac/3-3/3-3.htm)

Contact

Wendy DesBrisay
Executive Director
300-180 Metcalfe Street
Ottawa, ON K2P 1P5
Tel.: (613) 563-2464
Fax: (613) 563-2504
E-mail: mcl@literacy.ca
Internet site: www.literacy.ca

Language of service: English

Other Organizations and Businesses

For more information on specialized clear and simple communication service providers, in both the non-profit and private sectors in Canada, visit the National Adult Literacy Database at www.clear.nald.ca.

National Adult Literacy Database

Description and Mandate

The National Adult Literacy Database (NALD) is a federally incorporated, non-profit service organization that fills the crucial need for a single-source, comprehensive, up-to-date and easily accessible database of adult literacy programs, resources, services and activities across Canada.

Services provided

Database of Canadian clear and simple communication service providers (www.clear.nald.ca)

Links to Internet sites of clear and simple communication providers (www.nald.ca)

A digital library of books and documents related to literacy and clear and simple communication

Contact

Charles Ramsey
Executive Director
Scovil House
703 Brunswick Street
Fredericton, NB E3B 1H8
Tel.: (506) 457-6900
Fax: (506) 457-6910
E-mail: contactnald@nald.ca
Internet site: www.nald.ca

Language of service: English and French

Canadian and International Initiatives, provides a number of practical references for successful communication.

Canadian and International Initiatives[1]

8

Government of Canada

Canada Customs and Revenue Agency

Canada Customs and Revenue Agency (CCRA) administers the customs and taxation branches of the Government of Canada. CCRA has a long-standing commitment to establish clear external communications. The Public Affairs Branch has been offering the entire organization readability and editing services for over 10 years (see study entitled *Canada Customs and Revenue Agency's Readability and Editing Section*).

- **Internet site:** www.ccra-ardc.gc.ca

Communication Canada

Communication Canada's mandate is to improve communications between the Government of Canada and Canadians. For this purpose, Communication Canada works with other government departments and agencies to inform Canadians about the government services available to them. Communication Canada also strives to continually promote improvement in government communications as well as to support and to advise government communicators by making available the results of citizen-based research.

- **Internet site:** www.communication.gc.ca

Elections Canada

Elections Canada has developed a user-friendly guide to voting in Canada entitled *I Can Vote!* The guide aims to make the electoral process more accessible to all Canadians.

- **Internet site:** www.elections.ca

Finance Canada

Finance Canada has developed four model plain language loan disclosure documents designed to make it easier for consumers to understand credit card, line of credit and vehicle loan agreements.

- **Internet site:** www.fin.gc.ca

Health Canada

Health Canada's Division of Aging and Seniors has developed a document entitled *Plain Language Health Information: What Does it Look Like?* The document includes three plain-language pamphlets for seniors with low literacy skills. The Internet site provides important information on how to communicate with seniors, by various means of communication.

- **Internet site:** www.hc-sc.gc.ca

Human Resources Development Canada

The mission of Human Resources Development Canada (HRDC) is to enable Canadians to participate fully in the workplace and the community. In partnership with Justice Canada, HRDC is rewriting the Employment Insurance legislation based on the international plain language movement. The project's goal is to make this important piece of social legislation more user-friendly and easier to understand while preserving its current fundamental provisions and program principles.

- **Internet site:** www.hrdc-drhc.gc.ca

[1] This section provides a listing of successful Canadian and international communications initiatives. For more information on other initiatives, visit the National Adult Literacy Database (NALD) Internet site at www.nald.ca

8 Canadian and International Initiatives

Industry Canada

The *Industry Canada Style Guide for Writers and Editors* is intended for Industry Canada Communications and Marketing Branch staff, contract and departmental writers, translators, editors and proofreaders, and anyone else in the Department who is preparing material for publication. It is designed to help produce publications with clear and accurate content, written clearly according to the Department's standard practices. From the Industry Canada site, you can access Canada's business and consumer site (www.strategis.gc.ca), which offers an array of information on Internet site development.

- **Internet site:** www.ic.gc.ca

Justice Canada

The Department of Justice works to offer Canadians a fair, accessible and effective justice system.

- **Internet site:** www.canada.justice.gc.ca

The Canadian Firearms Centre has developed the following plain language guide: *Understanding Canada's Firearms Law - A Guide to Key Information in the Firearms Act, Regulations and Support Material.*

- **Internet site:** www.cfc-ccaf.gc.ca

National Literacy Secretariat

The mission of the National Literacy Secretariat (NLS) is to ensure that Canadians have opportunities to develop and improve the ever-expanding literacy skills needed to function at work, at home and in the community. It also supports the development and dissemination of information on literacy issues to increase awareness and understanding.

- **Internet site:** www.nald.ca/nls.htm

Natural Resources Canada

National Resources Canada has established an Internet Content Management Strategy to meet the needs of users.

- **Internet site:** www.nrcan.gc.ca

Transport Canada

Transport Canada is responsible for a number of key acts and regulations that govern Canada's transportation system and it has published various documents in plain language.

- **Internet site:** www.tc.gc.ca

Treasury Board of Canada Secretariat

The Treasury Board of Canada Secretariat provides information and resources on how to organize, write and manage the content of an Internet site. The Common Look and Feel (CLF) Standards for an Internet site is an important resource for people building, enhancing or revamping Internet sites within the Government of Canada.

- **Internet site:** www.cio-dpi.gc.ca

Canadian and International Initiatives

8

Other Canadian Initiatives

British Columbia Securities Commission

The British Columbia Securities Commission (BCSC) has published the *BCSC Plain Language Style Guide*, which offers many examples of clear writing in general and is a good reference for simplifying legal documents. You can also read their news release *Breathing New Life into Plain Language*.

Internet site: www.bcsc.bc.ca/about/plain_language.asp
This site is available in English.

Canadian Bankers Association

Canadian Bankers Association is committed to improving the readability of mortgage documents. The association has developed plain language mortgage documents.

Internet site: www.cba.ca
This site is available in English and French.

Canadian Bar Association

The Canadian Bar Association is essentially the ally and advocate of all members of the legal profession. Several provincial branches of the association have formed working groups on plain language.

Internet site: www.cba.org
This site is available in English and French.

The *Lawyers for Literacy Project* is an initiative of the B.C. Branch of the Canadian Bar Association. It helps lawyers improve their client communications, particularly when their client's literacy skills are not adequate to deal with written material. The *Lawyers for Literacy Project* helps lawyers to make some simple changes in their practice procedures to better meet the needs of clients with limited literacy skills.

Internet site: www.plainlanguagenetwork.org/LawyersForLiteracy/index.html
This site is available in English.

Canadian Labour Congress

The Canadian Labour Congress' (CLC) desk mat *Making It Clear: A Clear Language and Design Screen* is a quick tool published by the CLC's Workplace Literacy Project. It is useful for checking whether one is writing clearly. An accompanying guide called *Making it Clear: Clear Language for Union Communications* is a handy binder full of suggestions, examples and instructions on how to write in plain language.

Internet site: www.clc-ctc.ca
This site is available in English and French.

Centre d'expertise des grands organismes

The *Centre d'expertise des grands organismes* has created the exchange network on simplifying written communication. The purpose of this network is to share and pool the expertise of organizations on simplifying written communication for the benefit of ministries and agencies of the Government of Quebec.

Internet site: www.grandsorganismes.gouv.qc.ca/simplification.html
This site is available in French.

Clear Language and Design

Clear Language and Design (CLAD) is a public education program of the Toronto East End Literacy Project, a non-profit organization that helps adults learn to read and write, and educates the public about literacy issues. CLAD offers, on a fee-for-service basis, services in writing and consulting, editing and rewriting, reading effectiveness assessment, consulting and training.

Internet site: www.EastEndLiteracy.on.ca/ClearLanguageAndDesign
This site is available in English.

Communications Nova Scotia

Communications Nova Scotia (CNS) is the Nova Scotia government's full-service communications agency. It helps government departments and agencies get their message out. CNS is committed to developing and using plain language. The Internet site below aims to help people learn more about communicating clearly with their audience.

Internet site: www.gov.ns.ca/cmns/plainlanguage/default.htm
This site is available in English.

Community Legal Education of Ontario

Community Legal Education of Ontario (CLEO) is a community legal clinic that produces plain language material for people with low incomes. Topics include social assistance, landlord and tenant law, refugee and immigration law, workers' compensation, women's issues, family law, employment insurance and human rights. Most of their materials are in the form of booklets, pamphlets, fact sheets and manuals.

Internet site: www.cleo.on.ca
This site is available in English and French.

Consumers' Association of Canada

The mandate of Consumers' Association of Canada (CAC) is to inform consumers about marketplace issues, to advocate for consumers with government and industry, and to work with government and industry to solve marketplace problems. CAC focuses its work in the areas of food, health, trade, standards, financial services and communications industries, and strives to resolve other marketplace issues as they emerge. The CAC uses plain language in its communications with Canadian consumers.

Internet site: www.consumer.ca/library/educationalpublications.cfm
This site is available in English.

Saskatchewan Literacy Network

Saskatchewan Literacy Network is a non-profit organization that promotes and supports literacy through public awareness activities, advocacy, training and sharing information. It is committed to encouraging the use of plain language through training.

Internet site: www.nald.ca/sklitnet.htm
This site is available in English.

Service d'aide au consommateur

The Service d'aide au consommateur (SAC) is a private, non-profit organization. The SAC is committed to the promotion and defence of citizen consumers in the area of consumer goods and services.

Site Internet : www.service-aide-consommateur.qc.ca
This site is available in English and French.

8

International Initiatives

Australia

Commonwealth Department of Education, Science and Training

The Commonwealth Department of Education, Science and Training offers a link to LiteracyNet on its Internet site. LiteracyNet has useful literacy information from across the education and training sectors.

Internet site: www.dest.gov.au/ty/litnet
This site is available in English.

Plain English Plus

Plain English Plus is a group of people who want to bring the benefit of plain English to the world. Their skills include law, communication, language, research and management.

Internet site: www.plainlanguagenetwork.org
This site is available in English.

Belgium

Service public fédéral Personnel et Organisation

The Service public fédéral Personnel et Organisation (*Federal Personnel and Organization Service*) offers services to other federal public services in plain language. The on-line brochure, *Écrire pour être lu (Writing to be read)*, on administrative writing in plain language provides an entire series of very easy, concrete solutions to help write texts that are easier to understand and better adapted to their readers.

Internet site: www.mazfp.fgov.be/pointernet/fr/default_intro.htm
This site is available in French.

France

Ministère de la Fonction publique et de la Réforme de l'État

The Internet site of the Comité d'orientation pour la simplification du langage administratif (COSLA) *(Steering committee for the simplification of administrative language)*, created by France's ministry of public service and state reform, offers a set of tools for writing administrative correspondence using plain language.

Internet site: www.fonction-publique.gouv.fr/cosla/
This site is available in French.

Great Britain

Clarity

Clarity is a worldwide group of lawyers and interested lay people. Its aim is to promote the use of good, clear language by the legal profession.

Internet site: www.adler.demon.co.uk/clarity.htm
This site is available in English.

Plain English Campaign

Plain English Campaign is an independent pressure group fighting for public information in plain English. The site provides, on-line, several tools and free guides to assist in writing various documents.

Internet site: www.plainenglish.co.uk/index.html
This site is available in English.

Sweden

The Plain Swedish Group

For the past 30 years, the Swedish government has been working to improve communication between the administration and the public. The Swedish government set up the Plain Swedish Group to clarify and simplify language in official documents and to encourage government agencies throughout Sweden to start plain language projects.

Internet site: www.justitie.regeringen.se/klarsprak/english/plain_group.htm
This site is available in English and French.

United States

Plain English Network

The Plain English Network (PEN) is a group of volunteers working within the U.S. government to improve communications from the government to the public. They believe that better communication will increase trust in government, reduce government costs, and reduce the burden on the public.

Internet site: www.plainlanguage.gov/pen.htm
This site is available in English.

Plain Language

This annotated directory lists Internet sites, agencies and organizations that can help in the use of plain language or provide plain English writing techniques.

Internet site: http://garbl.home.attbi.com/writing/plaineng.htm
This site is available in English.

Plain Language Association International

Plain Language Association International (PLAIN) consists of professionals who design and create communications projects to better serve the needs of the public, clients and staff. It is a voluntary association of plain language advocates and professionals.

Internet site: www.plainlanguagenetwork.org
This site is available in English.

Communication Canada

Successful Communication

CASE *Studies*

Literacy and You

May 2003

Communication Canada

Canada

Introduction

The following studies demonstrate the successful application of the principles of plain language. They reinforce the tips set out in section 2, ***Successful Written Communication,*** for the implementation of plain language principles. Please note that examples featured in the studies appear in their original language. A vocabulary reference tool has also been included.

The first study, **Special Edition of *The East Coast Reader* on the 2001 Speech from the Throne**, deals with the presentation of information on government policy in plain language. ***The East Coast Reader*** is a Nova Scotia newspaper for individuals with low literacy skills. This study provides a brief overview of the process for communicating in plain language and provides many examples of how to do so.

The second study, **Communications from Human Resources Development Canada's Income Security Program**, presents information on an initiative to revise communications sent to clients of the Disability Benefits Division. The study briefly examines the editing process and also provides several examples of techniques for writing in plain language.

The third study, ***Services for First Nations People* Guide**, examines a publication produced by Communication Canada in collaboration with Indian and Northern Affairs Canada. A summary of the steps taken to produce the guide is followed by an excerpt from the publication outlining some of the fundamental strategies for communicating with First Nations.

The fourth study, **Canada Customs and Revenue Agency's Readability and Editing Section**, relates the efforts of the Agency to communicate in plain language. More specifically, the study describes the implementation of the Readability and Editing Section. It presents the service, particularly the process followed for editing and readability of texts. It also indicates the contribution of the Section's experts to the development of communication initiatives. The study provides two concrete examples of projects that were undertaken and successfully completed.

Finally, **Simplifying Vocabulary** offers suggestions on how to use everyday language. For a message to be understood, it is important to use everyday language, understandable by all.

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Special Edition of *The East Coast Reader* on the 2001 Speech from the Throne

This study deals with a special edition of ***The East Coast Reader*** about the Speech from the Throne. ***The East Coast Reader*** is a non-profit, plain-language newspaper. It is intended for people with low literacy skills in Nova Scotia.

The Approach

The idea behind this special edition was to explain to people how government policy applies to their everyday lives. ***The East Coast Reader*** therefore published a series of articles highlighting not only federal programs and services but also the people responsible for delivering them.

Federal departments and agencies, such as Environment Canada, the Canadian Food Inspection Agency, and the Royal Canadian Mounted Police, participated in this special edition. ***The East Coast Reader*** submitted the original texts on the programs and services supporting Throne speech initiatives to the appropriate government departments. The newspaper then rewrote the material following plain language principles. Following approval, they developed the layout in consultation with the department or agency.

Translation and French Adaptation

The process that led to the production of the French-language version was unique in that the French version which resulted is in plain-language French and is not just a straight translation of the English.

The East Coast Reader submitted the approved plain-language English copy to Public Works and Government Services Canada for direct translation into French. Following this, the *Fédération canadienne pour l'alphabétisation en francais* (FCAF) reviewed the copy to ensure that the plain-language French version was of the same quality as the English version.

Concrete Examples

- **Use familiar language.**

Before:
The laboratory has the ability to test for canning defects using a number of specific criteria and to communicate these defects and access the severity using standard terminology.

▸ After:
Scientists in the laboratory test food containers like cans to make sure they are not defective (faulty). If a can is defective the food inside it can make you sick.

Before:
Peacekeeping is also a significant component of Canada's foreign policy and our contribution to the multilateral security system. Fifty years of experience in peacekeeping and participation in an overwhelming majority of peacekeeping missions mandated by the United Nations Security Council has established an international reputation for Canada.

▸ After:
Peacekeeping is an important part of Canada's foreign policy. As a member of the United Nations, Canada has participated in many peacekeeping missions. For more than 50 years, Canadian men and women have been in peacekeeping missions all over the world. Thanks to their efforts, Canada has a reputation as a peacekeeping nation.

- **Use the everyday/common meaning of a word rather than the specialized or technical meaning.**

Before:
CFIA requires that federally registered fish processes implement and adhere to quality systems to ensure the safe production of fish and fish products. CFIA audits these systems. As part of these audits samples are taken for laboratory analyses to ensure criteria are being met.

▸ After:
This program helps make sure fish and fish products are produced safely in Canada.

- **Ease understanding – expand on less familiar ideas by explaining and defining them.**

Before:
Drug smuggling is an ongoing problem for us all.

▸ After:
Every year, large quantities of drugs come to Canada. Some drugs come by boat. Some drugs come by plane. This is drug smuggling. Drug smuggling is big business. It is against the law.

- **Use illustrative examples to help the reader identify with the information.**

Before:
The CFIA bulletin included a detailed list of client services including those related to food safety and consumer protection. In order to make this information accessible and relevant, a real-life scenario was called for.

▸ After:
Melanie was just about to add the boiling water to her oatmeal when she noticed something was wrong. "I could see some brown things in the bowl," says the Halifax woman. "To my horror, I realized I was looking at mouse droppings. They had somehow got into the dry oatmeal!"

Melanie knew exactly what she had to do. She picked up the phone and called the Canadian Food Inspection Agency (CFIA) laboratory in Dartmouth. "They asked me to send them the oatmeal so they could analyze it," says Melanie. "It didn't take long for them to call me back and confirm what I already knew."

Thanks to Melanie's quick action, the oatmeal was sent back to the manufacturer because it was not safe to eat. Once again the CFIA had come to the rescue.

Melanie's story illustrates just one example of the type of work done in the Dartmouth laboratory of the CFIA …

Special Edition of *The East Coast Reader* on the 2001 Speech from the Throne

Organize the wording – write in short sentences and sacrifice extra words to maintain clarity.

Before:

When most people think of farming, they imagine huge tracts of land in the Prairies, lush orchards in the British Columbia interior or verdant valleys in Ontario. In contrast, the garden for Acadian Seaplants Ltd. is the Atlantic Ocean and its crop — seaweed.

After:

When most people think of farming they imagine huge fields and orchards. The Acadian Seaplants farm is different. The Acadian Seaplants farm is the ocean and its crop is seaweed.

Use one idea per sentence.

Before:

Peacekeeping is an important aspect of Canada's national heritage and a reflection of our fundamental beliefs.

After:

Peacekeeping is an important part of our Canadian heritage (legacy). It is part of our national identity.

Use paragraphs appropriately; develop only one idea per paragraph.

Before:

The Maple Leaf. Breathtaking wilderness. A "Mountie". All are familiar international identifiers of our "True North Strong and Free". The image of the red-coated Mountie in broad-brimmed Stetson hat is instinctively associated with Canada around the world. But there is more to the Mounties than just a romantic image. The stage was set in 1873 for a role that would intimately connect the Mounted Police and its members with the development of Canada as a great nation. From the beginning of its long history, the Royal Canadian Mounted Police (RCMP) has served Canada and its people by establishing law and order in the frontier reaches of this vast nation. As the country grew in population and diversity, and its communities became more established, the Mounted Police adapted, ensuring the peace and security for its citizens.

After:

The Royal Canadian Mounted Police are so Canadian. People around the world associate the image of the red-coated "Mountie" wearing a broad-brimmed Stetson hat with our country. But there is much more to the Mounties than a famous uniform. For one thing there's the musical ride.

From the beginning of its long history the RCMP has served Canada and its people by establishing law and order in the four corners of this vast country. In the past, the Mounties did most of their serious work on horseback. They also entertained each other by showing off their riding skills.

Present lists vertically. Introduce lists with an explanatory sentence.

The Dartmouth laboratory operates under the Canadian Food Inspection Act (law). The CFIA uses:

- The Fish Inspection Act
- The Canada Agricultural Products Act
- The Food and Drugs Act
- The Meat Inspection Act
- The Consumer Packaging and Labeling Act.

Limit information to the essential.

Before:

Fish and fish products entering the country are inspected following a random risk-based sampling scheme which may be dependent on the history of the exporting country or on the quality of the product. The laboratory assists field inspectors in performing targeted analyses.

After:

Fish and fish products coming into Canada are inspected to make sure they are safe to eat.

- **Organize ideas in a logical fashion, beginning with what is of most interest to the reader.**

Before:

HALIFAX, May 5, 2001 — On behalf of Minister of Canadian Heritage Sheila Copps, Dr. Bridglal Pachai, President of the Celebrate Canada Committee for Nova Scotia, today announced that Stephanie Currie, 15, a student at Prince Arthur Junior High School in Dartmouth, has been chosen as the Nova Scotia finalist in the Canada Day Poster Challenge 2001 … All finalists and their guardians will be guests of Minister of Canadian Heritage, Sheila Copps, in Ottawa on July 1. They will join the Governor General, the Prime Minister and the thousands of Canadians who gather on Parliament Hill to take part in the Canada Day festivities.

After:

Canada Day was extra special this year for Stephanie Currie, Nova Scotia's finalist in the Canada Day Poster Challenge 2001. Along with the other provincial and territorial finalists from across Canada, the 15-year-old student at Prince Arthur High School in Dartmouth was the guest of Minister of Canadian Heritage Sheila Copps at the Canada Day festivities in Ottawa.

- **When there is a change of idea in the course of a document, summarize or explain the idea.**

Before:

Drug smuggling is an ongoing problem for us all. With over 27,000 kilometers of coastline to protect, the police need the public's help. We need your eyes and ears. Be an active partner.

After:

Every year, large quantities of drugs come to Canada. Some drugs come by boat. Some drugs come by plane. This is drug smuggling. It is against the law.

The Coastal Watch Program and the Airport Watch Program help stop illegal drugs from coming into the country. Nova Scotia has more than 27,000 kilometers of coastline. The police need the public's help to protect our coastline from drug smuggling. We need your eyes and ears. We want you to be our partner in the fight against drug smuggling.

- **Choose appropriate visual and print techniques (font, colours, bold, italics, etc.) to emphasize subdivisions within the document and use them consistently.**
  - All text is presented in an easy-to-read font (12-point Goudy for body text; 30-point Goudy Bold for headlines).
  - All text is left-justified (lined up to the left) to avoid irregular spaces in the body text.
  - There are no word-breaks or hyphenation (i.e. from the end of one line to the beginning of the next).
  - There is ample use of white space, with generous margins and room for notes.
  - An illustration or photo accompanies every story.
  - Additional information (such as detailed definitions, contact information, etc.) appears in a shaded box.
  - Colours, shading and borders are used to break up the text and separate stories that appear on the same page.

2

Communications from Human Resources Development Canada's Income Security Program

This study deals specifically with Human Resources Development Canada's review and re-drafting of the communications materials targeted to clients of the Disabilities Benefits Division using plain language principles.

The Project

In 2001, Human Resources Development Canada's Income Security Program team reviewed its communications with clients of the Disabilities Benefits Division. The purpose of doing so was to ensure that the language and design of the division's communications did everything possible to help clients understand and act upon its messages appropriately.

The team wrote the first drafts of a series of letters and documents to clients using plain language principles and techniques. The department worked with a plain language consultant who evaluated the effectiveness of the plain language techniques that had been applied.

The project was given to Clear Language and Design (CLAD) of Toronto to write a reading effectiveness report. Clear Language and Design has provided consultation, publishing and training services to various clients in the private and public sectors since 1995.

The Process

The materials for assessment consisted of two client letters, entitled "Your CPP disability payments" and "Confirming our telephone conversation." CLAD also assessed two documents:

- 1. "**Canada Pension Plan (CPP) Disability – Important Information**"
- 2. "**Canadian Pension Plan (CPP) – Other Benefits or Pensions.**"

Income Security Program officials provided the consultant with a well-researched profile of the client audience, ensuring that the consultant had a good understanding of the characteristics of this group of readers and their placement in the general literacy profile of Canadian readers.

The reading effectiveness assessment confirmed that the redrafted communications adhered to principles and techniques that would get the message across to the targeted readers and be appropriate to their levels of literacy.

In addition, the CLAD assessment pointed out a number of refinements to the drafting technique that would make the letters even more effective.

2 from

Communications from Human Resources Development Canada's Income Security Program

The Report

The reading effectiveness assessment covered four topics:

- organization
- tone
- language and sentence structure
- design or formatting

The substance of the report is reproduced on the following pages. The report confirms the effectiveness of the techniques and gives examples of how to transmit the message more effectively.

1) ORGANIZATION

Ordering information from the reader's point of view

All readers scan for information that is relevant to them. It should be easy for any reader to quickly find out what is important in a document, and what he or she must do. Readers are less likely to become frustrated when information is presented in a way that is logical from their point of view.

This was generally well done in the letters. For example, the letter entitled "Your CPP Disability Payments" told the reader right away that their review was completed and they were still eligible for payments. It then addressed the next subject of interest to the reader – when the suspended payments would start again. Next, the letter acknowledged that the client was working 12 hours a week, and provided reassurance that this would not affect benefits.

By placing the information of direct interest to the reader first, the letter increased the chances that the client would keep reading. The next part of the letter focussed on an item of importance to Income Security Program – the need to be informed if there is any change in work status.

Finally, the letter referred to supplementary information on other programs that the reader should know about, but did not need to act on at this time.

Grouping instructions

The letters contained a number of instructions on record keeping that seemed scattered. The message "IMPORTANT - KEEP THIS LETTER FOR YOUR RECORDS" appeared in the upper right. The same instruction was repeated in the closing paragraph, with different wording. A related instruction, "Please write your client identification number on all correspondence," appeared at the end of the letter, after the signature, centred on the page in bold face.

Instructions on a similar topic are more effective if they appear together, prominently, only once. Instructions that are repeated are liable to confuse the reader, especially if the language is inconsistent.

In this case, the instructions would be most effective if they were grouped under the sub-heading: Please keep this letter.

Using sub-headings or labels

Sub-headings are a highly effective way to help readers scan documents and focus on key information. The sample letters to income disability clients made liberal use of sub-headings – in some there were three sub-headings in a one-page letter. This was not at all excessive. Sub-headings are a genuine help to the reader.

Many studies have shown that the frequent use of sub-headings or "advance organizers" improves comprehension.[1] This is an effective tool for all readers, but particularly benefits poor readers.

[1] Ausubel, D. P. "The Use of Advance Organizers in the Learning and Retention of Meaningful Verbal Material", *Journal of Educational Psychology* 51 (1960): 267-272.

Communications from Human Resources Development Canada's Income Security Program

Using subject matter-specific labels

Sometimes writers are reluctant to use headings that seem obvious. They are afraid of insulting the reader. However, the writer is usually holding the information in long-term memory; the information "feels" much more obvious to the writer. The reader is seeing the information for the first time. Specific sub-headings do not seem repetitive or obvious to the first-time reader. The more specific, the better.

The following examples shows how some sub-headings in the letters could be made even more specific.

Before:

Your CPP disability payments

After:

Your CPP disability payments will start again

Before:

Confirming our telephone conversation

After:

Your CPP disability payment will continue

Before:

Staying in touch

After:

Keep us updated

Before:

If you have questions

After:

Call us if you have questions

2) TONE

Tone is the way writers use language, consciously or unconsciously, to evoke an emotional response. This can be a difficult aspect of writing, particularly when conveying important information to a potentially vulnerable audience, such as people on disability benefits. In any information for the general public, it is best to establish a tone that is direct, factual and helpful.

Addressing the reader in the second person

All of the sample letters to clients made very effective use of the second person singular or "you" form to address the reader directly. For example, "It is important that you contact us as soon as possible about any changes in your situation."

This has a much more immediate tone than the third person – "The recipient must contact Income Security Programs as soon as possible about any changes in their situation."

Overly formal tone

A tone that is overly formal or bureaucratic will discourage the reader from taking necessary actions. The sample documents almost never fell into this trap.

The way that tone is conveyed is a very subtle business, however, and even small things, like the use of capital letters, must be watched. Consider the difference in tone between this instruction:

-- IMPORTANT –

KEEP THIS LETTER FOR YOUR RECORDS

… and the same message, conveyed without the "shouting" feeling of the capitalization:

Important: Keep this letter for your records.

2 Communications from Human Resources Development Canada's Income Security Program

Overly friendly tone

On the other hand, a tone that is too friendly can lull the reader into a false feeling of complacency. It is especially important to avoid this since the writer may have to communicate unwanted news at some future time.

Writers should not refer to themselves as "I." This sets up too personal a tone for a business letter and can be confusing as well. In one of the letters, the writer switched from "we" to "I" ("We need up-to-date information from you …"; "I have enclosed information about other benefits …"). Using the pronoun "we" consistently encompasses the writer's colleagues, who may also communicate with the client, and the public institution itself.

The tone of the instructions was too soft in a letter to clients who, in future, may no longer qualify for pension benefits. The letter gave a number of instructions and conditions for continuing to receive disability payments. If the reader did not respond in good time, it could have meant losing payments or having to pay money back.

The following examples shows how the tone could be "firmed up" so that clients have no doubt about their responsibility:

Before:
As well, it is important that you contact us as soon as possible if your situation changes.

▸ After:
You must contact us about changes in your life that might affect your pension.

Before:
I encourage you to read and keep the enclosed information including this letter.

▸ After:
Please read and keep this letter and enclosed information.

Before:
You need to tell CPP as soon as possible if there are changes in any of the following.

▸ After:
Contact us right away if there are any changes in:

Before:
I have enclosed the following important information.

▸ After:
Please read the enclosed important information:

Being friendly but direct

The letter "Confirming our telephone conversation" was aimed at clients who had chronic illnesses from which they were unlikely to recover. The main purpose of the letter was to make sure they were aware of other benefits and programs for which they might be eligible in the future.

A softer tone was appropriate for the audience of this letter, but it was important to continue to be direct and businesslike.

The following examples shows suggested alternative phrases that still convey warmth, but are more direct.

Before:
I appreciate you taking the time to speak with me on...

▸ After:
Thank you for speaking with me on…

Before:
As well, it is important that you contact us…

▸ After:
Please contact us about any changes in your life.

Before:
I have updated your file with the information you provided.

▸ After:
We have updated your file with the information you gave us.

Before:
I have enclosed information about other CPP benefits or pensions that you or your family may be able to receive at some time.

▸ After:
Please read the enclosed information about other CPP benefits or pensions. You or your family may be able to receive them at some time.

Communications from Human Resources Development Canada's Income Security Program

2

3) LANGUAGE AND SENTENCE STRUCTURE

Reducing word and sentence length

Research confirms that reducing the length of words, sentences and paragraphs is a key factor in improving the readability of documents. Overall, the letters and documents to disability clients avoided complex, unfamiliar words and technical language. Sentences were generally kept short and clear, to avoid the need to read a passage more than once.

This was done particularly well in the document "Canada Pension Plan (CPP) – Other Benefits or Pensions," which defined each of the benefits and pensions using simple sentences. Here, for example, is the definition of retirement pension:

Retirement Pension: A monthly pension you can begin to receive as early as age 60 or as late as age 70. It is your choice when to apply. If you want to start getting your pension before you turn 65, you must stop working or work only a few hours a week. The amount of money you will receive each month depends on the amount you have paid into CPP and at what age you apply.

Plain language writing often requires more than one edit, because further editing so often reveals ways to simplify material even more, without losing meaning.

The chart on next page shows how further editing of word and sentence length would improve sections of the letters and documents.

Getting rid of needless words

The documents contained some redundant or needless words and phrases. Verbal "clutter" can make sentences appear more complex than they are. Remedy this by deleting phrases such as those underlined below:

- "the following information sheet and pamphlet"
- "I encourage you to read and keep this letter"
- "One of the ways CPP stays in touch with you is to review your file from time to time"
- "if there are changes in any of the following:"

2

Communications from Human Resources Development Canada's Income Security Program

Example from the draft letters:

- *One of the ways CPP stays in touch with you is to review your file from time to time. We may contact you to ensure that we are aware of any changes in your situation. As well, it is important that you contact us as soon as possible if your situation changes. We need up-to-date information from you to ensure that you receive the best possible service.*
- ***Work Activities:** You return to work for any employer or become self-employed and earn $3,900 or more in 2002 (gross income before taxes) – this amount may change slightly from year to year.*
- *You can do any of the following activities without telling CPP and still receive your disability payments:*
  1. *do volunteer work;*
  2. *go back to school or take a training program; or*
  3. *try to do some work and earn up to $3,900 in 2002 (gross income before taxes).*
- *Please write your client identification number on all correspondence.*
- *We would like to talk to you about your work situation. If you can only work once in a while, you may be allowed to earn more than $3,900 while still receiving CPP disability payments.*
- *You need to tell CPP:*
  1. *if you change your mailing address, telephone number, bank or bank account for direct deposit; or*
  2. *if a dependent child enters or leaves your care and custody (by birth, adoption, marriage, common-law relationship or death)*

Alternative:

- We review your file on a regular basis. We will contact you to update your disability file.

  You must contact us as soon as possible if your life changes. Up-to-date information will help us to serve you better.

- **Work:** If you return to work or become self-employed, and earn $3,900 gross income before taxes or more in 2002.

- You do not have to tell CPP about all of your activities. These activities will not affect your disability payment
  1. doing volunteer work
  2. taking a training program
  3. going to school; or
  4. earning up to $3,900 in 2002 (before taxes).
- Write your client identification number on all letters you send to us.
- You must call us about your work. You may be allowed to earn more than $3,900 and still receive CPP.

- You must tell CPP about any changes with:
  1. personal information: tell us if you move change your telephone number or change banks or bank accounts.
  2. dependent children: tell us if you have a new child, or if a child is not longer in your care and custody. The child may be yours by birth or adoption, marriage or living common-law.

CASE Studies

Communications from Human Resources Development Canada's Income Security Program

4) DESIGN (FORMATTING)

This group of sample documents demonstrated that considerable thought that had gone into formatting them for maximum readability. The following are the key design principles that affect a reader's ability to easily find information and act on it appropriately.

Body type

The type for the body of the letters and documents was set at 12 points or higher, in a serif type such as **Times New Roman**. Type that is smaller than 12 points causes difficulties for older readers.

Standard serif typefaces are most readable for information that will be sent on paper, because the letter shapes aid in word recognition.

Headings

The headings and sub-heading were set in a sans-serif type, such as **Arial**, in bold face. The "up and down" shape of this unornamented type style helps to lead the eye down into the body of the paragraph following. Placing the sub-heading closer to the paragraph that follows it rather than the one preceding it, also helps to visually associate the sub-heading with the content.

White space

Generous margins and space between paragraphs created "white space" in the documents. This is needed by readers to rest the eyes and for navigation. Too much information on one page can discourage readers before they begin.

Justification

All of the documents were justified (or lined up) on the left, and unjustified, or "ragged" on the right. This left justification creates a fixed point of return at the beginning of each line, while the ragged line endings create uneven white space in the right margin. The reading eye uses these uneven endings as a place marker so that it can return accurately to the next line.

3

Services for First Nations People Guide

This study deals with the guide ***Services for First Nations People***. Public opinion research conducted on reserves had shown the need to better inform members of the First Nations regarding Government of Canada services. Thus, in collaboration with Indian and Northern Affairs Canada, Communication Canada produced a guide for Aboriginal peoples living on reserves. Published in March 2003, this guide is intended to provide First Nations with information regarding services and programs offered by the Government of Canada.

The Approach

First, various departments submitted descriptions of their programs and services. Based on that information, Communication Canada and Indian and Northern Affairs Canada produced a draft guide in both official languages. Then, to ensure that members of the First Nations living on reserves found the guide useful and informative, production went through several stages. Plain language specialists revised the text in order to shorten, clarify and simplify the document. Next, experts in communications with Aboriginals reviewed the draft guide and made recommendations. Focus groups also provided comments on the draft. Finally, following the revision process, Communication Canada and Indian and Northern Affairs Canada worked in close co-operation with the appropriate departments to ensure that programs were accurately described.

Concrete Examples

- **Define unfamiliar words.**

  Before:

  The Geological Survey of Canada has been providing Canadians with a comprehensive ***Geoscience*** *knowledge base to support economic development, public safety and environmental protection since 1842.*

  ▸ After:

  Geoscience, the study of the Earth, is helping northern Aboriginal communities make the right decisions about land use.

- **Use standard word order.**

  Before:

  There are many services and benefits provided by Veterans Affairs Canada that you or members of your family may be entitled to...

  ▸ After:

  You or your family may be entitled to certain services and benefits.

Services for First Nations People Guide

- **Keep sentences short.**

Before:

There are many services and benefits provided by Veterans Affairs Canada that you or members of your family may be entitled to if you are a war veteran or civilian with theatre-of-war service, or a serving or former member of the Canadian Forces regular or reserve, or the RCMP. ***(49 words)***

After:

As a war veteran or a civilian with theatre-of-war experience, you or your family may be entitled to certain services and benefits. **(22 words)** Benefits are available to serving or former members of the RCMP or Canadian Forces (regular or reserve). **(18 words)**

- **Present important information first.**

Before:

The Geological Survey of Canada has been providing Canadians with a comprehensive geoscience knowledge base to support economic development, public safety and environmental protection since 1842. Survey scientists offer technical workshops and public information sessions to northern Aboriginal communities to explain the importance of geoscience in land-use decision making.

After:

Geoscience, the study of the Earth, is helping northern Aboriginal communities make the right decisions about land use. The Geological Survey of Canada supports economic development in those communities by focusing on environmental and public safety issues. Contact the Geological Survey of Canada to schedule a technical workshop or public information session in your community.

- **Use bullets to lighten the text.**

Before:

Programs are shown in bold text. Titles of directories, booklets and pamphlets appear in italics. You will also find toll-free telephone numbers, and Web site and mailing addresses. These will allow you to access services or more information.

After:

- Programs are shown in bold.
- Toll-free telephone numbers and Web site and mailing addresses are provided with each service description.

Before:

These include financial help through the War Veterans Allowance Program, home care and community-based long-term care through the Veterans Independence Program and a tax-free disability pension.

After:

Support includes:

- financial help through the War Veterans Allowance Program;
- home and community care through the Veterans Independence Program;
- a tax-free disability pension.

- **Use the active voice.**

Before:

There are literally hundreds of programs and services offered by the Government of Canada.

After:

The Government of Canada offers a variety of programs and services for First Nations people.

- **Arouse the reader's interest. Use positive tone.**

Before:

There are literally hundreds of programs and services offered by the Government of Canada but, sometimes, it can be difficult to find out about them.

› After:

Services for First Nations People: A Government of Canada Guide describes many of these services and how to access them.

- **Address the reader directly.**

Before:

Over 28,000 First Nations students are funded to attend universities, colleges or other recognized post-secondary institutions each year through Post-Secondary Education Programs.

› After:

If you are an Aboriginal student, you may be able to get financial support for tuition, books and other education costs.

- **Use meaningful headings.**

Before:

There are many services and benefits provided by Veterans Affairs Canada that you or members of your family may be entitled to if you are a war veteran or civilian with theatre-of-war service, or a serving or former member of the Canadian Forces regular or reserve, or the RCMP.

› After:

Veterans entitled to benefits

As a war veteran or a civilian with theatre-of-war experience, you or your family may be entitled to certain services and benefits.

- **Highlight important information.**

Before:

You can also call 1 800 567-9604 or visit www.inac.gc.ca. Click on "Programs and Services" on the top menu bar, then click on "Education." While you're there, go to "Scholarships, Bursaries and Awards Guide for Aboriginal Students" *to check out the E-Directory, a searchable list of more than 500 scholarships, bursaries and awards available to Aboriginal students.*

› After:

1 800 567-9604

TTY: 1 866 553-0554

www.inac.gc.ca and click on ***Programs and Services*** on the top menu bar, then click on ***Education***. Also go to ***Scholarships, Bursaries and Awards Guide for Aboriginal Students*** and check out the ***E-Directory***.

- **Present information in a way that facilitates the reading and tracking of information.**
  - The guide includes a table of contents and a user guide.
  - Align text so that it is left-justified. This prevents irregular spacing between words such as in a centre-justified text.
  - Use sans-serif fonts in bold such as **Arial** for titles and subtitles to emphasize programs, for example.
  - Use serifed fonts such as **Times New Roman** in 12 points for the general body of the text.
  - Place telephone numbers and Internet addresses in shaded boxes for easy identification.

■

4

Canada Customs and Revenue Agency's Readability and Editing Section

This study deals with Canada Customs and Revenue Agency's (CCRA) Readability and Editing Section. Several years ago, CCRA (then Revenue Canada) firmly committed to improving its communications and making plain language a priority. At the end of the 1980s, it set up the Readability and Editing Section.

The Readability and Editing Section

The Readability and Editing Section, which consists of 18 full-time employees (with support from freelancers as required), oversees language quality and the use of plain language. The service has made guidelines on the writing style used in the organization and on writing in plain language available to its employees.

The service edits numerous communication products for the public at large and for CCRA employees. Each day brings its batch of texts of all kinds: press releases, information documents, questions and answers, media lines, media advisories, speeches, miscellaneous bulletins and notices, ministerial messages, and messages from the Commissioner and other senior Agency executives.

Each year, the Readability and Editing Section, in conjunction with Client Services of the Tax Services Office, edits the entire series of fiscal publications. This represents hundreds of pages of forms and thousands of pages of guides and brochures. Each document is subject to very tight deadlines, dictated by document authorization and printing schedules.

However, readability and editing officers do not merely pencil corrections into written documents. Other Public Affairs Branch sectors ask for their contributions in other areas where questions can also arise in relation to plain language.

For the past three years, CCRA has run a nationally televised advertising campaign during the tax return production period. In the early design phases, the officers are called upon to give their advice on the messages and dialogue for the advertisements, to maximize the campaign's effectiveness. Numerous production factors come into play as well, of course, but the organization recognizes the importance of a clear message and appropriate language level.

The Department also calls on the officers' expertise in some public opinion research by asking them to participate in focus group testing. Officers are encouraged to recognize situations where plain language would ensure that CCRA's message is understood and to propose solutions in that regard. If people clearly understand the messages, they will make fewer mistakes and will not need to call telephone information services for clarification.

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Canada Customs and Revenue Agency's Readability and Editing Section

Needs-Adapted Editing

Not all texts require the same level of intervention, and a range of practical factors is also involved. So before starting to edit a document, officers consult the author and, if appropriate, the communications advisor, to decide on the type of editing to be done. To do this, it is important to consider the circumstances specific to each project (whether what is involved is a new publication or an update, etc.), the availability of resources and deadlines to be met. The service does the following six types of revision:

Reading

Ideally, this takes place after the document has been edited more thoroughly. In this case, officers:

- correct typographical errors;
- correct spelling and grammar mistakes; and
- apply CCRA stylistic rules *(e.g., use of upper case letters and italics)*.

Correction

This is a slightly more in-depth operation than reading. Officers:

- correct typographical errors;
- correct spelling and grammar mistakes;
- apply CCRA stylistic rules; and
- apply the basic principles of plain language *(e.g., standardization of terminology and grammatical structures)*.

Unilingual Editing

Officers:

- rework the text in terms of plain language principles;
- examine content and consistency of text and presentation of information, given the intended recipient and the context of the publication; and
- edit certain sections or rewrite and reorganize the document in full, as required.

Bilingual Editing (or Parallel Editing)

Ideally, to produce a more meticulous text, the source document should undergo unilingual editing *(see above)* before being sent for translation. Once the text has been translated, officers:

- compare it to the source text to ensure conformity; and
- carry out a unilingual editing of the translation.

The order of these phases may vary depending on the time allotted for the work. For example, officers may compare the two versions of a text while the source text is undergoing unilingual editing, even if that means making the necessary modifications to the translation subsequently.

Examination for Readability

Officers intensively examine the French and English versions of the document, from design to final approval, in close co-operation with the authors. This examination can take from several weeks to several months. Target publications are pre-selected in accordance with established criteria.

Adaptation

Officers modify the original version for one or more of the following reasons:

- to adapt it to a new audience;
- to update its content;
- to change the tone of a message;
- to avoid a literally translated text.

Of course, the duration of editing projects varies depending on the length and complexity of documents, the number of changes to be negotiated with the author and the time spent in research.

Canada Customs and Revenue Agency's Readability and Editing Section

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Concrete Examples

- **Partial reworking of the *General Income Tax and Benefit Guide***

In early 1999, a joint project of Client Services and the Readability and Editing Section condensed and simplified certain information in the *General Income Tax and Benefit Guide*.

What was involved was a change of approach in the nature of the guide. Previously, the Department had outlined all the information that was potentially applicable to every taxpayer. The new objective was to provide only the information applicable to the majority. If an individual wanted to know how to apply for a deduction or a credit of interest to a small proportion of taxpayers (e.g., an income tax credit for the donation of a work of art or an ecological gift), that individual was referred to another publication where he or she would find all the necessary details (in this case, the brochure entitled *Gifts and Income Tax*).

The two services took advantage of this reworking to edit all of the texts involved and to simplify them as much as possible. Of course, they had to deal with the usual constraints on editing in similar situations. For example, how does one explain a complex legislative provision simply? In spite of it all, readability and editing officers try to simplify information as much as possible.

- **Editing of the brochure entitled *Support Payments***

In early 2000, Client Services planned a major revision of the brochure entitled *Support Payments*.

Since the Act had changed three years previously, Client Services felt it was no longer necessary to mention old rules regarding this matter. It was determined that individuals subject to these rules were already familiar with them, and there was no need for others to become so. This step alone reduced the number of pages in the brochure by nearly half. Client Services also considered providing information in the form of a table or chart, so that people could quickly grasp what was involved.

The Readability and Editing Section worked closely with Client Services and the brochure was ultimately enhanced with a questionnaire table and a decision-making chart covering the various aspects of taxation rules. Ultimately, the brochure was reduced to 12 pages from 36 pages the year before!

Plain Language: Designed to Last

The Readability and Editing Section undertakes projects designed to improve the Agency's texts and publications on an ongoing basis. This has enabled CCRA to continue the task undertaken by the Government of Canada 15 years ago: to foster improved communication with all Canadians through the use of plain language.

Simplifying Vocabulary

The choice of words is an important step in plain language. For the recipient to understand the message, the language must be familiar and understandable. This section therefore offers suggestions for simplifying vocabulary.

NOUNS

Instead of ...	Use ...
• *Aggregate*	• Total
• *Assistance*	• Help
• *Cognizance*	• Knowledge
• *Commitment*	• Promise
• *Compensation*	• Pay, wages, fee, salary
• *Consequence*	• Result
• *Employment*	• Work
• *Expiration*	• End
• *Input*	• Comments, opinion
• *Locality*	• Place
• *Modification*	• Change
• *Objective*	• Aim, goal
• *Obligation*	• Debt
• *Output*	• Product
• *Parameter*	• Boundary, limit
• *Personnel*	• Staff
• *Portion*	• Part
• *Residence*	• Home

VERBS

Instead of ...	Use ...
• *Accomplish*	• Do
• *Accumulate*	• Gather
• *Acquire*	• Get
• *Activate*	• Begin, start
• *Cease*	• Stop, end
• *Conceal*	• Hide
• *Contribute*	• Give
• *Demonstrate*	• Show
• *Disseminate*	• Send, distribute
• *Effectuate*	• Bring about, carry out
• *Elect*	• Choose, pick
• *Implement*	• Carry out
• *Inquire*	• Ask, question
• *Necessitate*	• Make necessary, call for
• *Strategize*	• Plan
• *Summon*	• Send for, call

Simplifying Vocabulary

ADVERBS AND ADJECTIVES

Instead of ...	Use ...
Accordingly	So
Additional	Added
Apparent	Clear
Approximately	About
Equivalent	Equal
Explicit	Plain
Feasible	Possible
Forthwith	Immediately
Frequently	Often
Herein	Here
Initial	First
Insufficient	Not enough
Ongoing	Continuing
Solely	Only
Specified	Named
Subsequent	Next
Substantial	Big, large, great, significant
Sufficient	Enough
Thus	So, that way
Viable	Possible
Voluminous	Bulky

UNNECESSARY WORDS AND SIMPLER EXPRESSIONS

Instead of ...	Use ...
Adequate number of	Enough
Along the lines of	Like
As a means of	To
By means of	By
During such time	While
In the interest of	For
In the event that	If
In view of the fact that	Because
Make the acquaintance of	Meet
No later than	Before
Notwithstanding the fact that	Although
The manner in which	How
This is a topic that	This topic
Under the provisions of	Under
Until such time	Until
With a view to	To
With reference to	For, about, concerning

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